

**SECTION**  
SERVICES

**SUBJECT**  
PARTICIPANT DIRECTION OF SERVICES (Self-Direct)

REFERENCES: ARM: 37.40.1115, 1117, ARM 37.90.436

**DEFINITION**

The waiver is designed to offer individuals the opportunity to direct their services. The program is designed around a person centered recovery planning framework which promotes self-direction and control in the planning and delivery process of Personal Assistance Services and Specially Trained Attendant Care. The goal of the program is to increase an individual's ability to live in the community and promote independence.

Self-direct is available to individuals who choose to take responsibility, or have a personal representative take responsibility, of managing their waiver services. The program is for individuals who require personal assistance with activities of daily living (ADL) and or Instrumental activities of daily living.

**ELIGIBILITY**

Upon intake to the waiver case managers will inform the individual about the self-directed option. If the individual indicates interest in the program the case managers will provide an orientation guide about self-direct opportunity in the waiver. (Copies of the guide may be obtained from AMDD). Individuals on the waiver will have the opportunity to select traditional provider model services or the self-direct option. Mountain Pacific Quality Health and the CMT will educate the member on scheduling and signing off on the timesheets of the service providers.

When the individual's choice is self-direct the case managers will send a referral to Mountain Pacific Quality Health. Mountain Pacific Quality Health Nurse will do a home visit with the individual who is interested in the program. The nurse will interview the individual to determine functional capability and eligibility for the program. Mountain Pacific Quality Health may choose to conduct the interview by phone.

To be eligible for the program the individual must meet all of the following criteria:

- a. Be full Medicaid eligible and meet nursing facility level of care criteria
- b. Demonstrate a medical and functional need for assistance with activities of daily living, which is substantiated by symptoms and a medical diagnosis
- c. Have the ability to direct services authorized by a Health Care Professional
- d. Have services authorized by Mountain Pacific Quality Health (MPQH)
- e. Meet capacity to direct self-direct services or have a personal representative meet capacity to direct services.

**SECTION**  
SERVICES

**SUBJECT**  
PARTICIPANT DIRECTION OF SERVICES (Self-Direct)

REFERENCES: ARM: 37.40.1115, 1117, ARM 37.90.436

- f. Be capable of assuming the management responsibilities of self-direct services. This includes being capable of making choices about activities of daily living, understand the impact of these choices, and assume responsibility for the choices, or have their personal representative assist them in making choices and directing their activities
- g. Be capable of managing all tasks related to service delivery. This includes the ability to manage recruitment, hiring, scheduling, training, directing and dismissal of worker(s).

**SERVICE DELIVERY**

Individuals who are eligible and wish to participate with the self-direct option will be able to choose from personal assistant and home health agencies to receive support to be successful with the program.

The individual has decision-making authority over the worker(s) who provide services. The individual may function as the common law employer or the co-employer of workers. The worker(s) will be an employee of the agency. The agency will advise and assist the individual in the interview process of selecting a worker(s).

The agency will provide support to the individual and their worker(s). The agency will:

- a. Advise, train, and support the individual, as needed and necessary
- b. Assist with recruiting, interviewing, hiring, training and managing and or dismissing workers
- c. Manage the employee including mandatory training and payroll
- d. Assist with monitoring health & welfare.

**Individual Requirement**

Within 3 months of choosing to receive their services through the self-direct model members must take and complete a WRAP plan or the Living Well With a Disability class. These programs are designed to assist the individual in acquiring, retaining and improving self-health, socialization and adaptive skills to reside successfully in the community.

**Case Management Team**

The case management team will assist the individual in developing a back-up plan such as when a worker does not arrive at the designated time. The CMT will assist in reviewing the risks to the individual's service provision and develop a plan to mitigate those risks.

**SECTION**  
SERVICES

**SUBJECT**  
PARTICIPANT DIRECTION OF SERVICES (Self-Direct)

REFERENCES: ARM: 37.40.1115, 1117, ARM 37.90.436

**Personal Representative**

A personal representative will be required for any individual enrolled on the program who has impaired judgment as identified on the assessment used by Mountain Pacific Quality Health at the time of the interview for determining functional capability.

The individual, MPQH, case manager, service provider, and AMDD may request a personal representative be appointed. The personal representative may be a non-legal person chosen freely by the individual. The personal representative must be willing and able to fulfill the responsibilities as outlined in the Personal Representative Agreement. The personal representative must be at least 18 years of age and obtain written approval of the individual to serve in this capacity. A personal representative may not be paid for their services nor be a paid worker or paid to provide any other waiver service to the individual. The personal representative must sign the Personal Representative Agreement and an Authorized Personal Representative Designation Form provided by the chosen agency. The personal representative will participate in the person centered recovery plan development and review.

The non-legal representative will be under careful scrutiny of the case manager team, AMDD, and MPQH. If the non-legal representative does not fulfill the agreement and does not demonstrate an ongoing commitment to the individual, is consistently unavailable for meetings, maintains minimal contact with the individual or does not honor the individual's preferences the representative will be removed as the personal representative.

Individuals who use a personal representative still have the requirement to take Living Well With a Disability class or WRAP training. They may also be in the process of completing a WRAP plan. The personal representative is **NOT** able to take the class in place of the waiver member. The individual has the same 3 month time constraint to complete the classes.

**Specially Trained Attendant**

Individuals receiving self-direct services may require having their worker(s) trained as a Specially Trained Attendant. Specially Trained Attendants are trained as recovery oriented aides with skills to assist the individual with their ADL/IADLs.

Specially Trained Attendants who serve individuals on self-direct must receive a minimum of 8 hours of training in mental health and recovery. Training and certification must be approved by the Community Program Officer (CPO). The Helena College, University of Montana offer an online certification program for direct care mental health providers. Mental Health First Aid is another training that is available. Both programs meet the mental health training requirement for Specially Trained Attendants.

**SECTION  
SERVICES****SUBJECT**  
PARTICIPANT DIRECTION OF SERVICES (Self-Direct)

REFERENCES: ARM: 37.40.1115, 1117, ARM 37.90.436

Specially Trained Attendants who serve individuals with physical disabilities must receive 4 hours of disability-specific training. Specially Trained Attendants who serve individuals with Traumatic Brain Injury must receive an additional 4 hours of TBI-specific training. Training and certification must be approved by the CPO. It is the responsibility of the provider agency to ensure that assistants are appropriately trained under agency based services.

**VOLUNTARY TERMINATION**

An individual may, at any time stop the self-direct option and return to the traditional provider managed model. The individual will notify the self-direct agency of their intention. The case manager will coordinate services to ensure that no break in vital services and timely revision of the person centered recovery plan occurs. The reason for the voluntary termination will be documented in their electronic health records.

**INVOUNTARY TERMINATION**

When any of the quality management teams (MPQH, case managers, service provider, and AMDD) identifies an instance where the self-direct option is not in the best interest of the individual and corrective action (additional training, appointment or change of personal representative, etc.) does not remedy the situation, the individual will be informed in writing of the plan to transfer to traditional provider managed service delivery. AMDD, in collaboration with agency and case managers will ensure that no break in vital services and a timely revision of the person centered recovery plan occurs. The individual may appeal this decision by requesting a fair hearing through the Department of Public Health and Human Service Fair Hearing process. When the individual is terminated from the program a letter will be sent to them and their personal representative, if appropriate. The letter will inform the individual and the personal representative of their right to appeal the decision and request a fair hearing.

**PAYMENT TO LEGALLY RESPONSIBLE INDIVIDUALS**

Payment for this service may be made to legally responsible individuals if program criteria are met.